LEA Plan

Administrator and User Guide

Tracker v2.8

June 2012

Acknowledgements

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- Arizona Department of Education
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Putting Your Plan Into Tracker

Your Plan Leadership Team will likely want to initially write your Plan offline. Your Tracker Plan is a living document, so when entering your Plan into Tracker, you can save your work at any point, and come back and edit any part of your Plan later, as needed. You may also RETIRE portions of your plan completed in the previous year, to remove them from the Plan Overview (see page 26).

For entering Plan information into Tracker, it is recommended that you have an electronic copy of your Plan (such as a Word document) rather than a paper version. This will make it easier for you to copy and paste detailed information from your Plan into Tracker.

Plan Organization

Tracker uses a tiered structure for your Plan: Goals, Strategies, and Action Steps. You may also add specific Tasks to Action Steps. You can create a Budget for your plan, and track expenses as you implement the Action Steps.

Goal	A specific, measurable target for students to achieve. States **Who** will do **What** by **When**, and **How** you will know it. (You may write them in SMART format: Specific and Strategic, Measurable, Achievable/Attainable, Results-oriented, and Time-bound.) LEAs may have some goals pre-assigned by the State, and may also add their own, local goals. Schools may select goals from the LEA's plan, and re-write them to reflect the school's achievement target, and create their own goals. Title: Maximum 50 Characters Description: Maximum 1000 Characters
Strategy	A general description of a process the LEA or school will take to reach the student achievement goal. Each Goal may have several Strategies. For example, What will the LEA/school do to ensure that the goal is reached? Title: Maximum 50 Characters Description: Maximum 500 Characters
Action Step	A specific action or activity that will lead to the implementation of the Strategy and achievement of the Goal. The Action Step includes a **Title**, **Description**, **Begin** and **End Dates** plus comments on timelines, persons responsible, costs and budget sources for each Action. Progress is tracked by updating status, attaching evidence, and adding comments as the step is implemented. Action Steps may also be "tagged" for filtered views of the plan, e.g. all steps affecting Special Education students, or involving Professional Development. Each Strategy may have several Action Steps. Title: Maximum 50 Characters Description: Maximum 1000 Characters
Task	A specific action/activity that leads to the completion of an Action Step. Tasks have specific **Due Dates**, **Persons Responsible** and **Current Status**. Each Action Step may have multiple tasks. Title: Maximum 50 Characters Description: Maximum 255 Characters

Administration Tasks to Prepare for Plan Entry

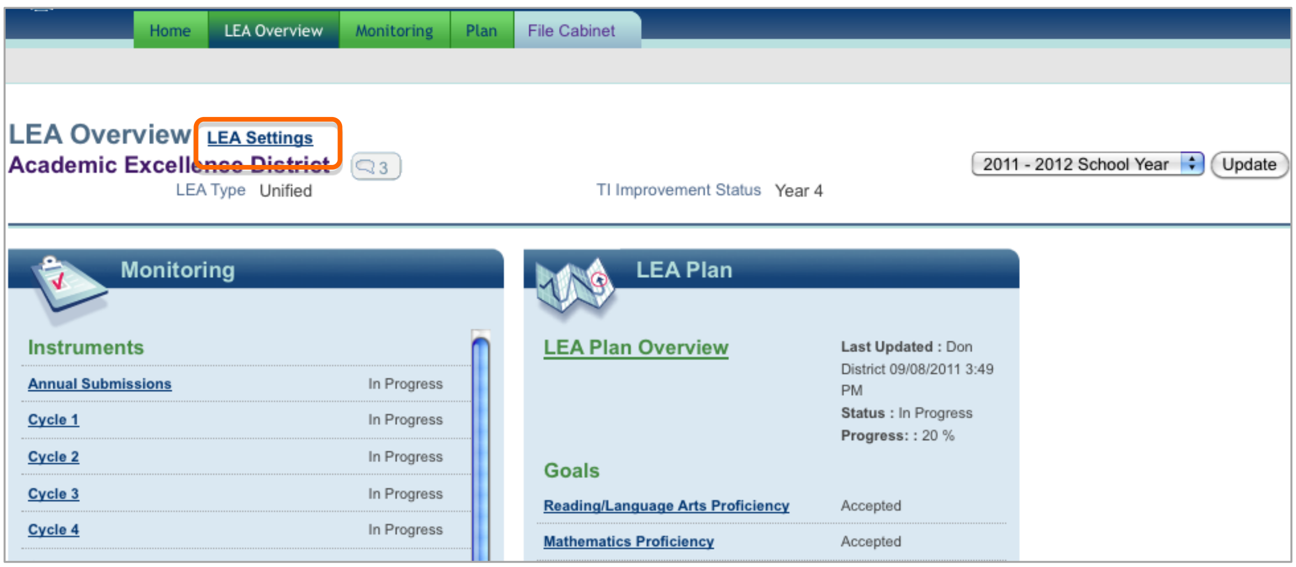
Plan Administrators have the ability to Add/Edit features in preparation for Plan entry. This set-up should be done before your Team starts entering your plan, so that all features are available. The set-up steps include:

1) Set up LEA Tags
2) Add/Manage Goals
3) Add Users to your plan
4) Add Budget Allocations

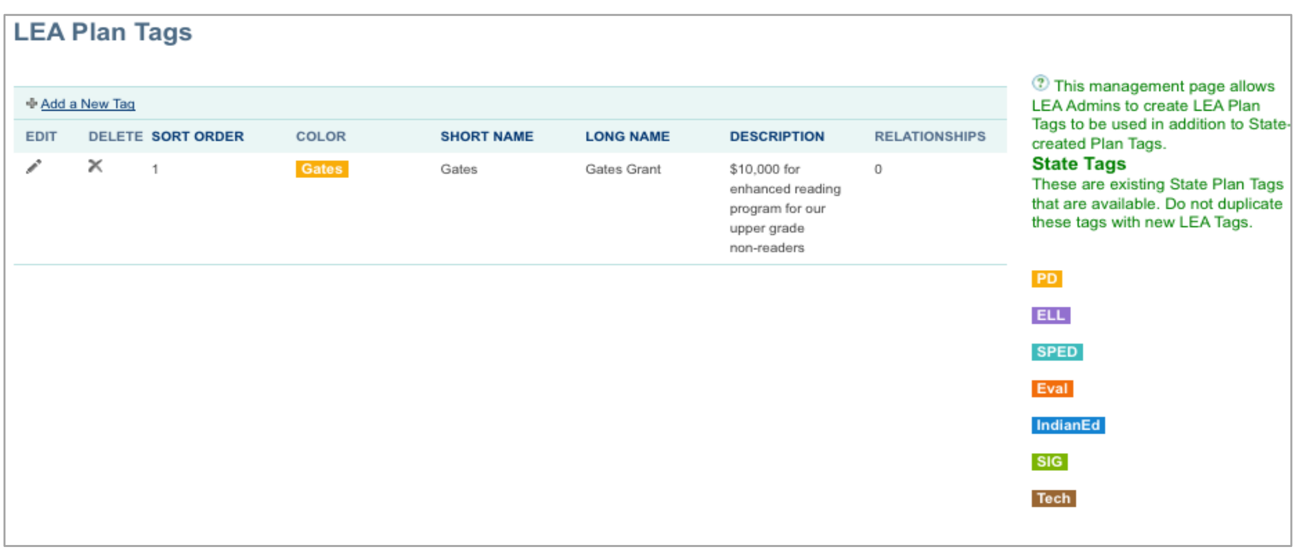
Set-up LEA Tags

In addition to the Plan Tags created by the SEA, LEAs may create their own set of Tags, available to their LEA and School plans, as appropriate to your plan management and implementation needs.

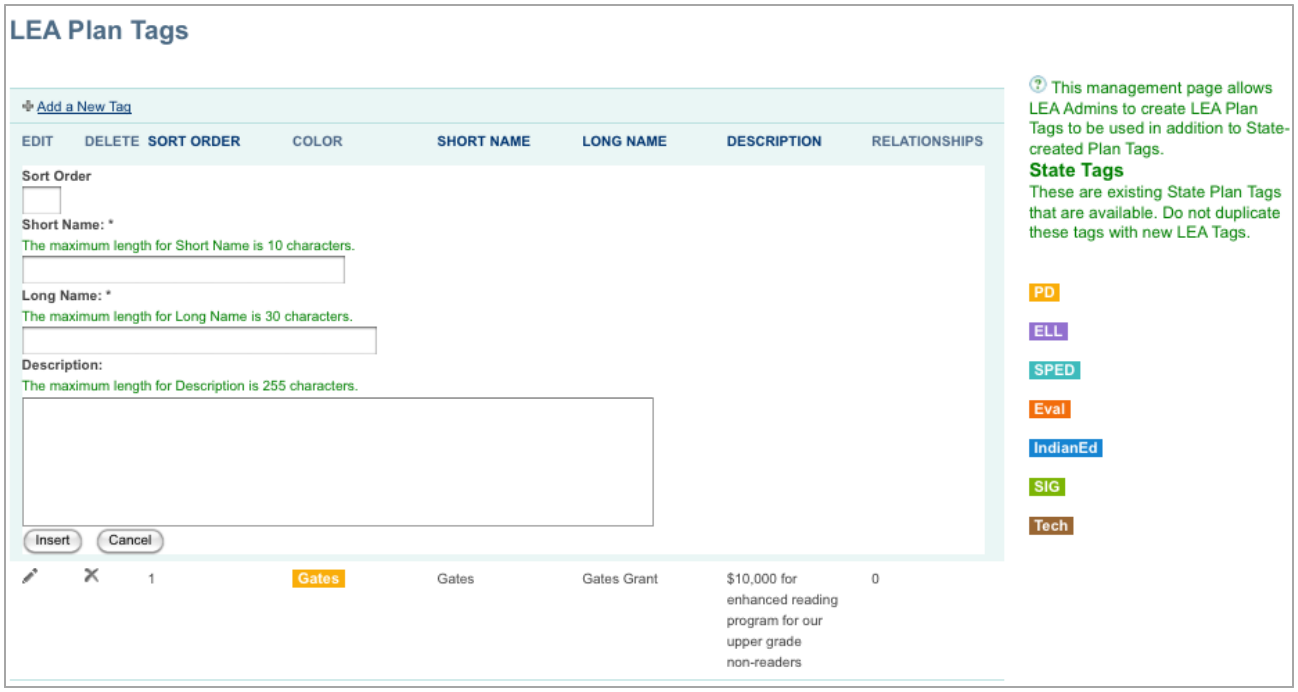
To add LEA-specific Tags, click on the LEA Settings link on the LEA Overview page:



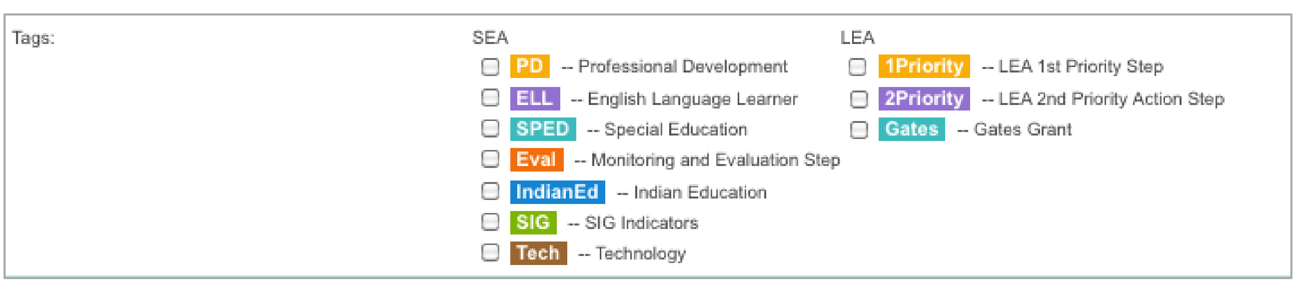
You will see a list and descriptions of any LEA Tags already created, as well as a list of all SEA Tags available. To see a full description of the SEA Tag, hover over the Tag name.



Click on “Add a New Tag” to create additional LEA Tags. Assign your new Tag a Sort Order (1-8 determines the color of the tag); a Short Name which appears in the Tag colored label (up to 10 Characters, no spaces); a Long Name (up to 30 characters), and a Description (up to 255 characters.) The Long Name and Description will reflect in a pop-up by hovering over the Tag label wherever it appears in the plan.



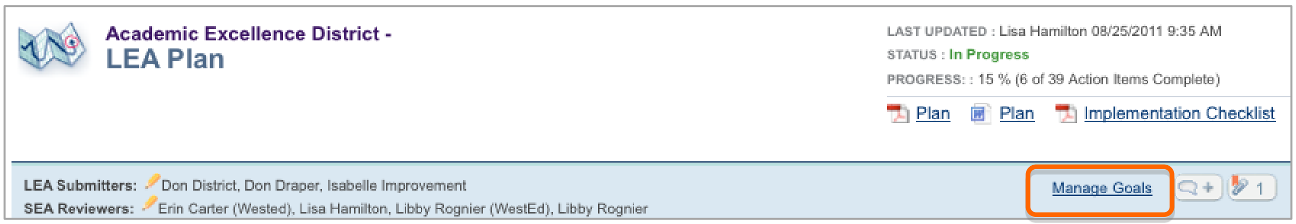
Click “Insert” to save your Tag which adds it to the LEA Tag list. You may also edit any existing LEA Tags by clicking on the pencil icon, or delete a tag by clicking on the X. Both the SEA and LEA Tags will be listed on the Action Step Add/Edit page. You may associate as many Tabs that fit the Action Step. Up to 8 SEA and 8 LEA Tags will show on the Plan Overview for each Action Step. Both sets of Tags will show in the filters on the Plan Overview. You may see the full description of a Tag by hovering the cursor over the name, anywhere the Tags appears in the Plan.



Add/Manage Goals

Your SEA may pre-assign goals and strategies to your plan. If so, these will appear in the plan, ready to be edited with descriptions specific to your site needs. You will not be able to edit the titles of the state-added goals or strategies. You may also wish to add goals and/or strategies unique to your site. Your SEA may have retired goals that were assigned to LEAs in previous years. If so, the retired goals, with associated strategies, action steps and tasks may be viewed by selecting the “Retired” filter on the plan overview. If the LEA wishes to activate any of these retired goals, they may do so from this view.

Only Plan Administrators may add new goals to a school or LEA Plan. All Users can edit existing goals, and add strategies, action steps and tasks. To add a goal, click on the “Manage Goals” link. (If you are not an Administrator, you will not see this link.)



You may also re-sort the goals to determine the order in which goals appear in your plan.

The origin indicates at what level the goal was first entered into Tracker. If the SEA created goals that are auto-assigned to your plan, the origin will be SEA. If you edit a state-created goal template, you will be able to customize the description, but you cannot change the title of the template. If you add a new goal, the origin will appear as LEA or School.

You may also select goal and strategy templates, created by the SEA, that were not assigned to your plan, but are available for you to add if you wish. Adding the SEA goal template to your plan will automatically add the strategies associated with the goal.

Manage Goals

GOALS USED IN MY PLAN

Reorder Goals   Add a new Goal

Origin	Title	
SEA	**Reading/Language Arts Proficiency** All students (including students with disabilities, English language learners, and the economically disadvantaged and 5 racial/ethnic subgroups) will attain proficiency or better in reading/language arts, by 2013-2014.	Edit Goal
SEA	**Mathematics Proficiency** All students (including students with disabilities, English language learners, and the economically disadvantaged and 5 racial/ethnic subgroups) will attain proficiency or better in mathematics, by 2013-2014.	Edit Goal
SEA	**Teacher Qualifications** 100% of the teachers and paraprofessional will be highly qualified at time of hire as measured by completion of attestations and the HQT Input Position Report beginning with the 2009-2010 school year.	Edit Goal
SEA	**Proficiency in English for ELLs** All English language learners *will become proficient in English.*	Edit Goal

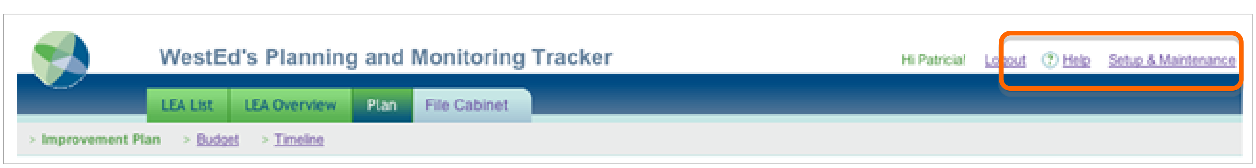
TEMPLATE GOALS

Origin	Title	
SEA	**After School Enrichment Programs** Institute an after-school enrichment program, available to all students, providing instructional enhancement and content extension to improve achievement and participation of all students.	Add to LEA Plan
SEA	**Student Safety and Fitness** Establish a program of fitness and safety courses including team and individual sports, nutrition and food preparation, personal and public health instruction.	Add to LEA Plan
SEA	**Language Instruction for ELL Students** Provide customized language instruction for all ELL students to facilitate English facility and ability to participate in standard classroom instruction.	Add to LEA Plan

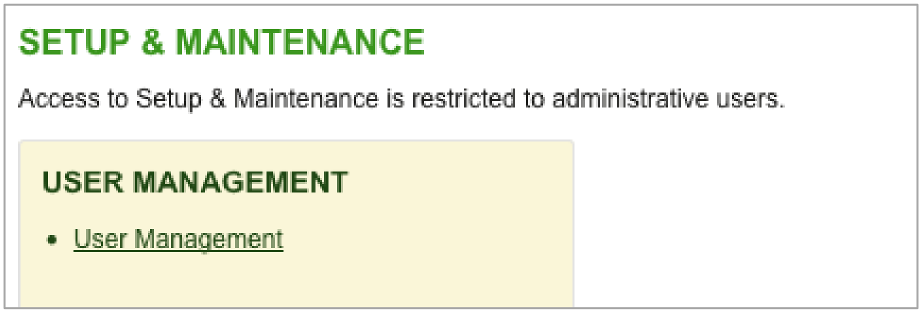
Once your goals and strategies are added, your team will want to add detailed action steps and tasks, specifying who will do what, by when, what it may cost, and which funds will support it.

Add Users

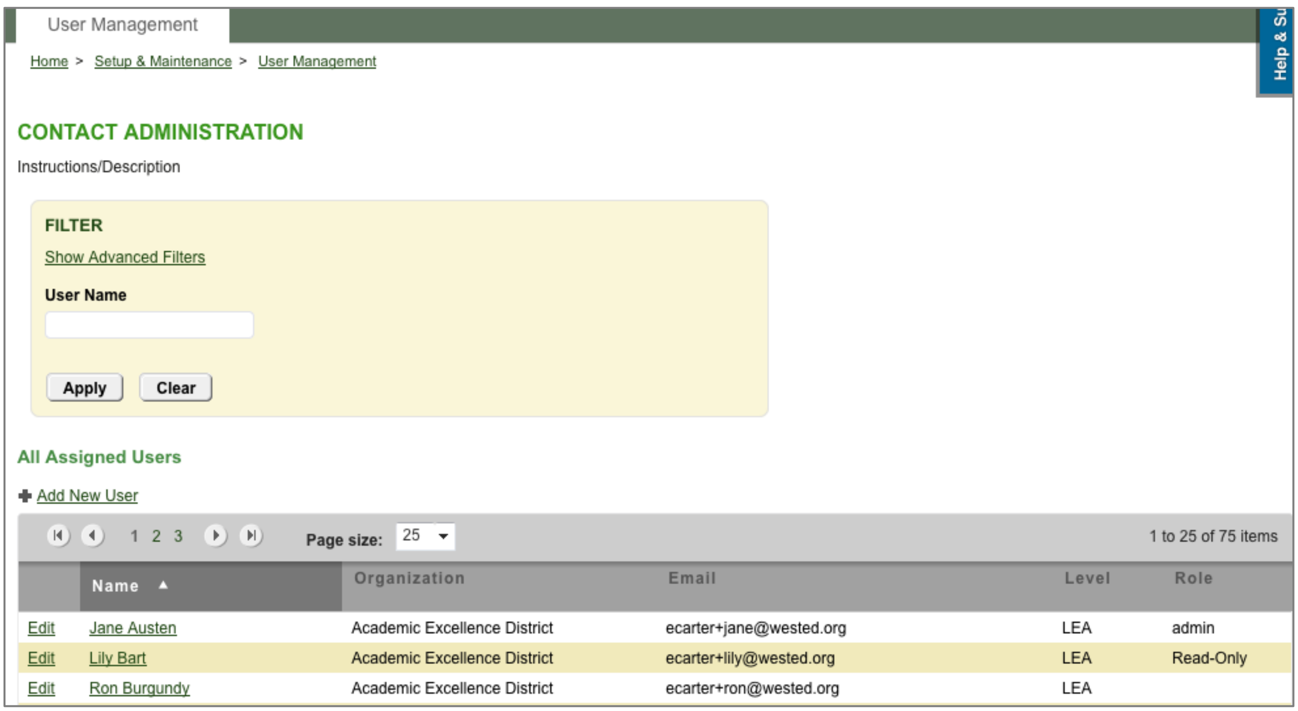
As the LEA or School Plan Administrator, you may give people access to your plan as users. Users may edit anything on the plan overview, add strategies, action steps and tasks, upload documents and make comments on plan elements. A user may be assigned as a person responsible for an action step or task, and will be able to add budget items, status updates, and other indicators of plan implementation. To add a new user, click on the setup and maintenance link at the top of the page. Only Plan Administrators will see this link.



From the Setup & Maintenance menu, click on User Management.

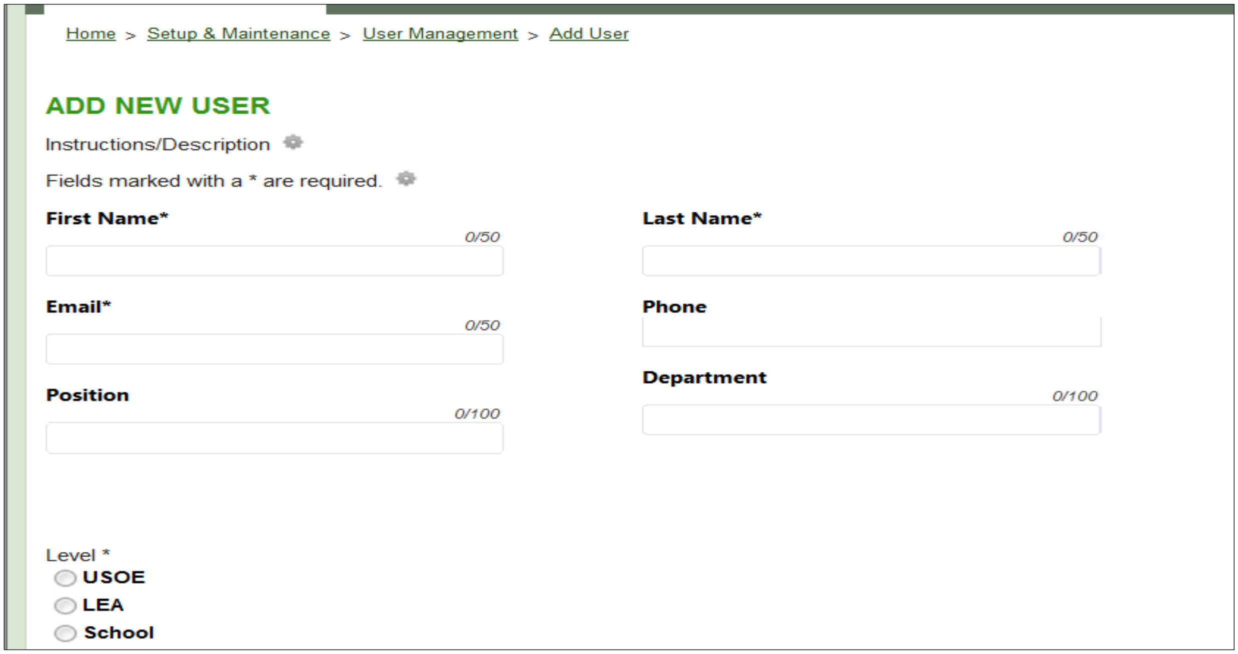


You will see a list of all users currently assigned to your organization(s). If you don't see the person you're interested in, you can create a new user account from this screen.



You may search for users by name, or use the Advance Filters to search by Role and/or Organization.

To add a user, first choose the "Add New User" link. Select their Access Level (LEA or School) and the Organization they should be affiliated with. Then complete the required fields (and optional fields, if desired) and click Create Account. An invitation with a link to the system will be sent to the new user. The Access Level assigned will determine what the User is able to do.



User Access Levels:

LEA User

LEA Users can work with both the Plan (Tracker) and Monitoring (DMI) Instruments. They can create Plan goals, strategies, action steps, tasks and upload documents to the File Cabinet. They can respond to monitoring items by uploading evidence and responding to instrument item questions. LEA Users can also see, comment on, and attach files to School Plans in the LEA.

LEA Administrator (Added by the SEA)

In addition to performing all the functions of an LEA User, LEA Administrators have the ability to create new users in their LEA (LEA and School level) and select which LEA users may submit completed monitoring instruments to SEA. They can create LEA tags, manage goals and add or edit funding sources for the Plan. They also have the ability to edit School Plans in the LEA.

School User

Where school plans are available, School Users may perform all of the Plan functions that LEA Users may perform. For LEA Plans, School Users may upload documents and post comments. Additionally, School Users may upload draft documents associated with their school to the LEA's program monitoring items. They may see other schools' plans, but may not edit them.

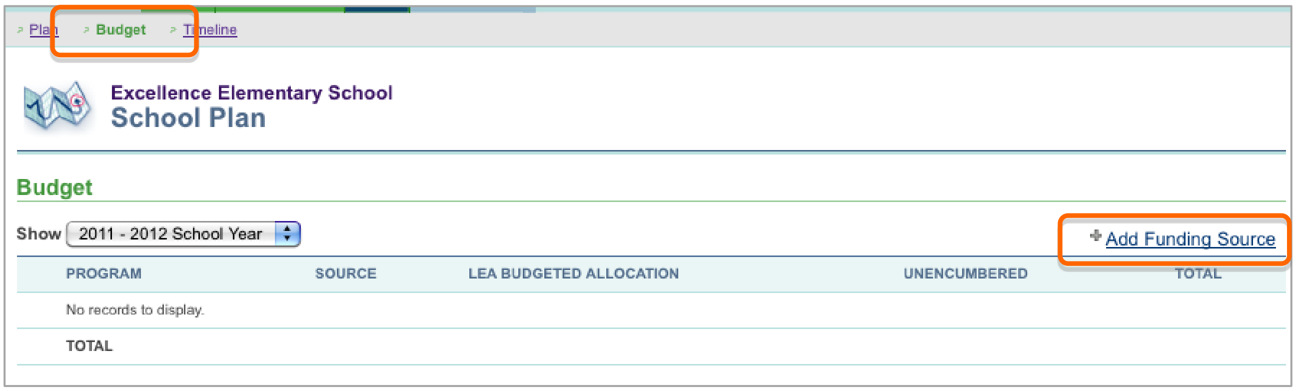
School Administrator (Added by LEA Admin or SEA)

In addition to performing all the functions of a School User, School Administrators have the ability to create new users for their school. They can manage goals and add or edit funding sources for the Plan.

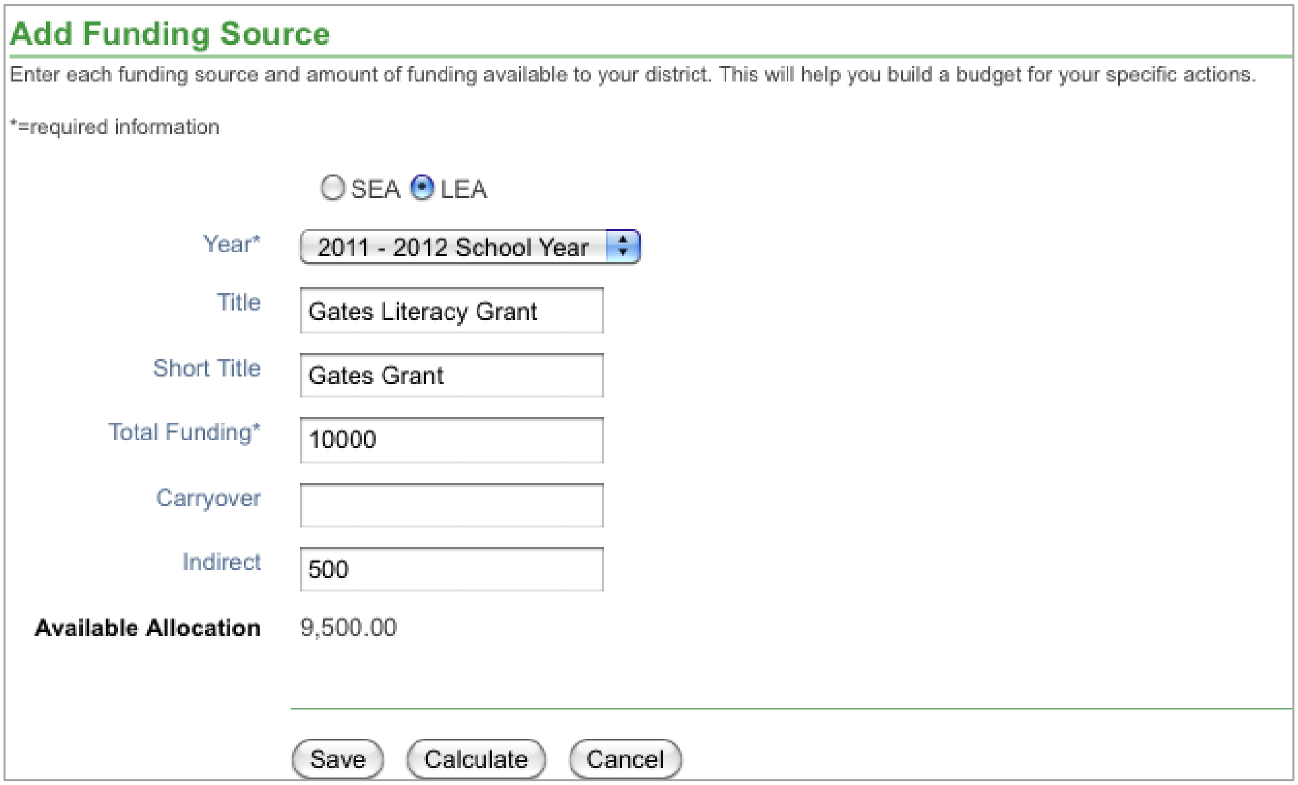
Add Budget Allocations

The LEA or School Plan Administrator is responsible for adding allocations to the plan budget from available funding sources. These allocations are then available for Budget Items throughout the plan.

From any plan page, click the “Budget” link at the top to see the overall Plan Budget. LEA or School Plan Administrators will also see the “Add Funding Source” link.



LEA Administrators may select Federal or State funding sources (added by the SEA). LEA Administrators may also create their own LEA (Local) funding sources. On the Add Funding Source screen, select SEA or LEA to add a new source. SEA Funding Sources will allow you to select from a dropdown list of all available Federal and State sources. (NOTE: If you have already added a source to your budget, you may edit it on the budget overview page. It will no longer appear in the drop-down list.) An LEA Funding Source lets you type in a Title and Short Title (up to 20 characters for display) as well as fund information. School Administrators will select from a single dropdown list of funding sources added by the LEA.



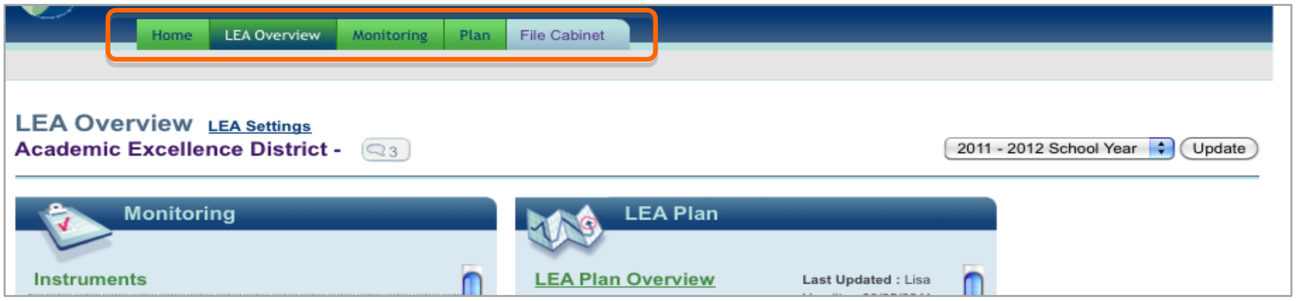
All Funding Sources allow optional Carryover and Indirect amounts. The Available Allocation is the sum of the Total Funding + Carryover – Indirect. This amount appears as the Total column in the Plan Budget. You may click on Calculate to verify the amount before saving the record.

Once Funding Sources have been added by the Administrator, Plan users may assign them to Budget Items.

The rest of this Guide covers Plan entry and Plan implementation monitoring for all Tracker users.

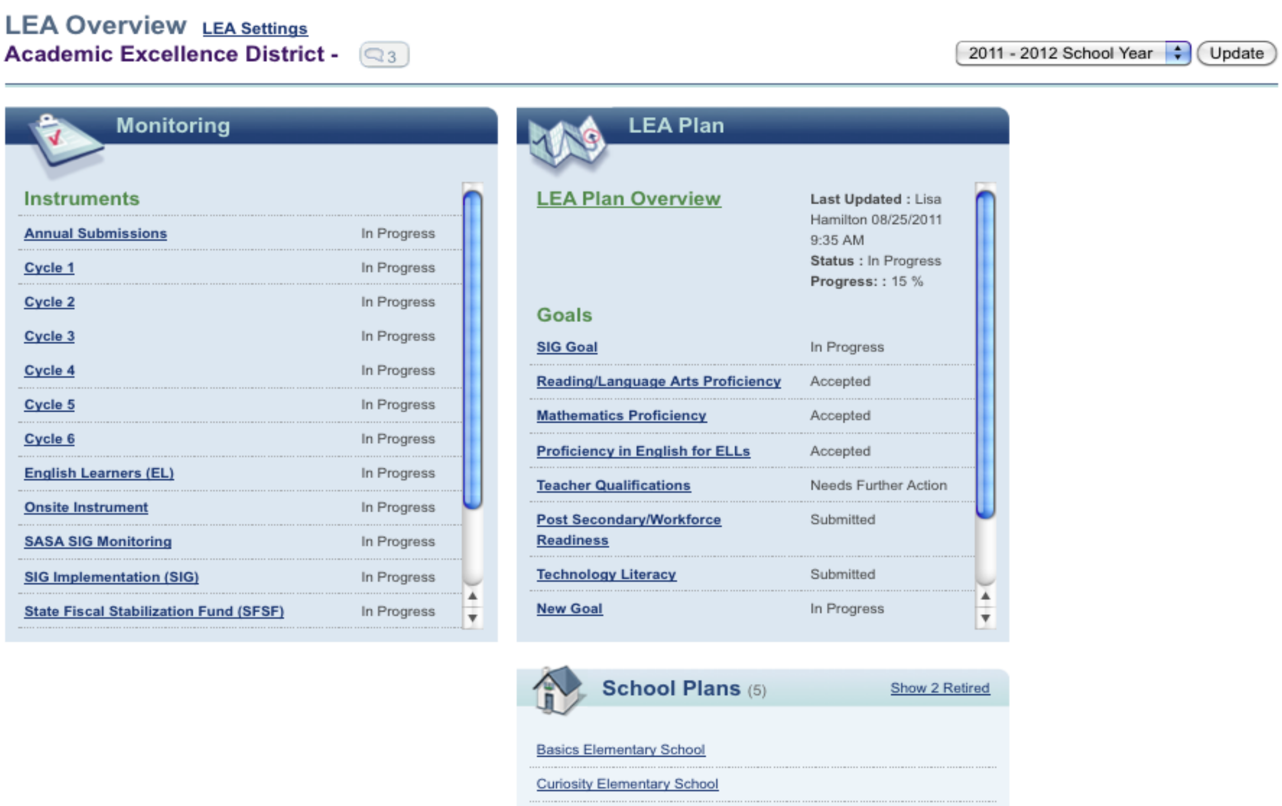
Plan Overview and Features – View, Add, Edit

From your LEA Overview page, click “LEA Plan Overview” to see your LEA Plan page. School plans are also accessed from this page, by clicking on the name of the school in the list below the LEA Plan Overview. A school login generally takes you directly to the Plan Overview for your school. You can view this page by clicking the green “LEA Overview” link at the top of each page.



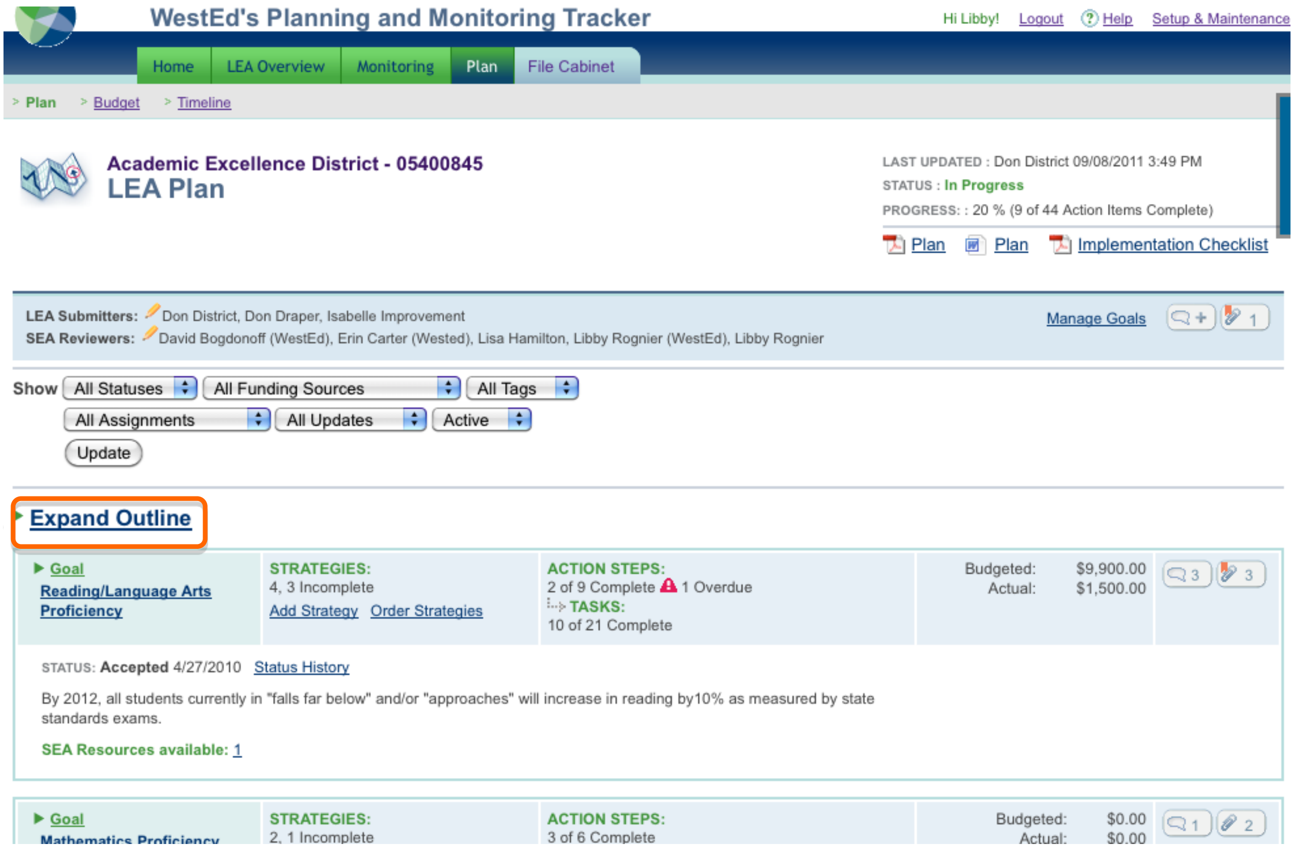
The LEA Overview gives access to the LEA Plan, School Plans in the LEA, and the LEA Monitoring Instruments. Both LEA and school users may view any of the plans and monitoring instruments. School users may only edit their own school plan, but may view, comment on, and download documents from any of the plans. School users may also upload draft documents to the LEA Monitoring Instruments as evidence for the required monitoring items. Clicking on “LEA Plan Overview” will take you to the top of that page. Clicking on a Goal title will take you to that Goal on the Overview page.

From the LEA Overview, you may also switch to view previous year’s data. Although your plan is



continuous from year to year, Budget Sources and Items are year-specific. If you are an LEA Admin, you may also set LEA Tags (used in addition to the SEA Tags) on the LEA Settings link on this page. SEA and LEA Tags are also available for school plans. Click on "LEA Plan Overview" or the name of your school to go to your Plan page.

The Default overview shows all of the goals in your plan. To expand your plan and see the strategies, action steps and tasks, either click on the "Expand Outline" link to expand the entire plan, or click on the green triangles at each level to reveal the next level below.



Your plan overview allows you to access and edit any part of your plan, attach and link to comments or files within your plan, see at a glance due dates for action steps and tasks, and what is overdue.

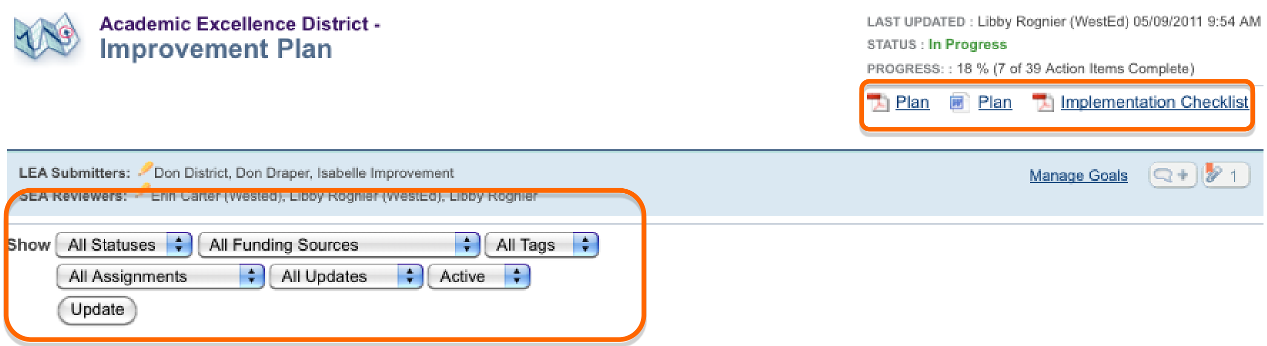
Tracker Plan Screen Elements

Main Navigation

The main navigation tabs allow you to easily access your LEA or plan overview, as well as the Help documents, from any page within Tracker. Only Plan Administrators will see the Setup & Maintenance link. Directly below the tabs, there are links to access the Plan Timeline and Budget. These features will be described later in this guide.

Print Reports and Filters

The "Plan Report" links at the top of the overview allow you to create and print reports based on the content of your plan. You may print a full or filtered view of the plan overview (Plan links), as a PDF or Word document, or create an Implementation Checklist report, which shows the status history of all action steps and their associated strategies and goals. Under those links are the options for **filtering** the plan by Status of Action Steps (Not Begun, In Progress, Completed, Suspended), Funding Source, Tags (State or LEA), Person Assigned to a task or action step, or recent Updates (Last 2 weeks, Last month, Last 3 months, Overdue.) You may also show all Active or all Retired portions of the plan.



Once you select the desired filter options, click "Update" to refresh the plan outline to see the updated view. When filters are applied, only those portions of the plan contained within the filter parameters will show on the overview or print in a report.

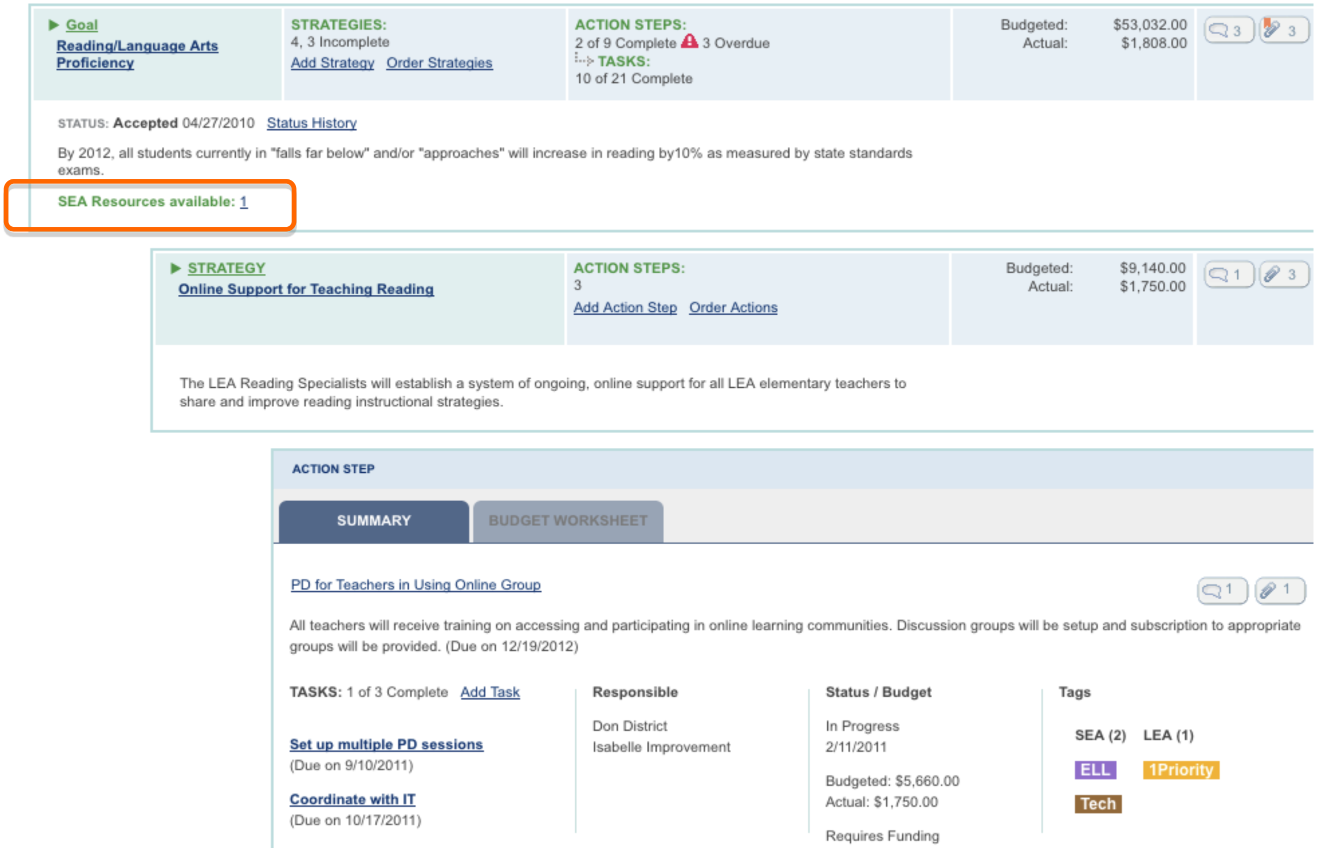
After clicking the "Plan" PDF or Word link, your browser will download a copy of the plan. The download location and how you access the print version will depend on your individual browser and download settings.

Note: When you have a custom filter applied, that filter will stay active, even after navigating away from the plan overview page and returning later. If you wish to remove your custom filter(s), click the "Clear Filters" button. Selecting the Plan or Implementation Checklist report when a custom filter is active will print the filtered version of the plan.

Plan Status

As you move down the plan overview screen, you will see status indicators for parts of the plan that are complete, incomplete, and overdue. These indicators can help you see at a glance those areas of your plan that need attention. The Goal Status line shows the name of the goal on the left, followed by the number of strategies and associated functions. Action step and task status data is next, with budget information displayed on the far right. The budget information is "rolled up" from the values entered for action steps under that particular goal.

If the goal and strategies originated at the state level, there may be SEA resources attached to either or both. These are documents provided by the state to assist LEAs and schools in meeting the requirements of the goal and strategy. They can be accessed by clicking on the number next to "SEA Resources available."



The action step detail includes persons responsible for the step, status of implementation, associated tasks and tags. The budget information identifies whether or not the action step requires funding. If so, the total budgeted and actual amounts for the current school year are shown.

The Comment and Attachment icons indicate how many of each are associated with this Plan element. Clicking on the icon allows you to view and add an attachment or a comment at that level within the plan. Attachments may be added to the plan, goal, strategy or action step level. Comments may also be added to tasks. If the paperclip has a red flag on it, it means that there is Requested Evidence that needs to be attached to that element. Specific evidence may be requested by the SEA at the plan level or on any state-assigned goals or strategies.

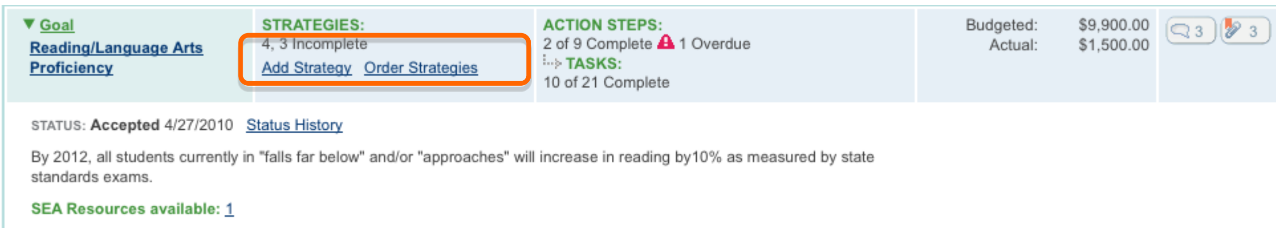
Entering Plan Data

This section will review how all Users can add new content to the plan (Strategies, Action Steps, Descriptions, etc.) and update content as you implement or refine your plan.

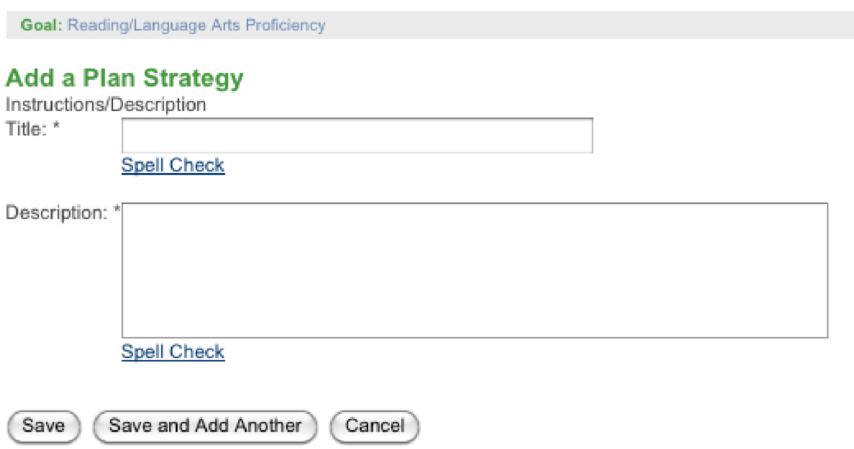
Goals – Your plan goals will be added by the SEA or by your Plan Administrator. (See page 6 for instructions.)

Strategies

The next step is to add strategies. You may add as many strategies as necessary to successfully achieve your goals. To do so, click the "Add Strategy" link in the goal preview section.



The Add a Strategy entry screen will appear.

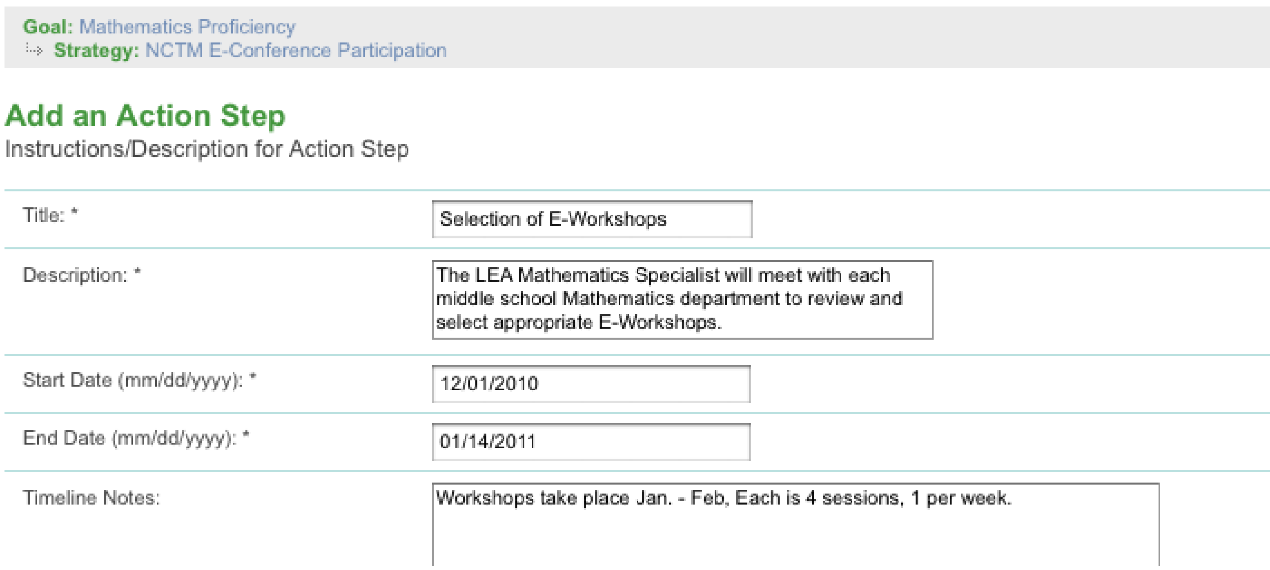


For each new strategy, you enter a short title as a reference for the activity you are describing. For the description, you may be more specific about what will happen and who will participate. When you are finished, press "Save" to return to the lan or "Save and Add Another" to create a new strategy. The title may be a maximum of 50 characters, the description maximum is 500 characters. Once a strategy is created, you can modify it by clicking the strategy title link on the plan overview screen.

Action Steps

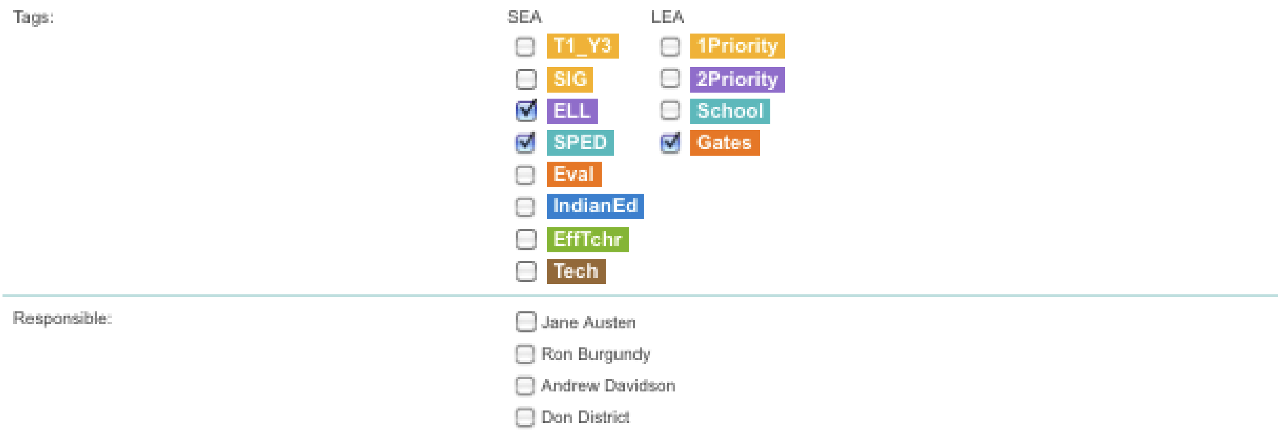
After you create a strategy, you will add specific action steps that outline what needs to be done. action steps should be reasonable steps needed to accomplish a strategy, leading to the achievement of a goal.

On the plan overview screen, in the strategy box, click the “Add Action Step” link. The Add an Action Step screen will appear, showing the related goal and strategy at the top.



The fields with * are required (Title, Description, Start and End dates.) If the action takes place over a long period of time, you may want to add Timeline Notes (e.g. Once per week for 10 weeks.) If appropriate, check the Requires Funding and/or Professional Development checkboxes. You will come back later to specify the budget item(s) and actual costs. All budget amounts assigned to action steps total up to the strategy and goal levels on the plan overview. If this is a Professional Development activity, you may want to note the intended audience for the PD.

Scrolling down the page, you will see two columns of possible tags which may be assigned: one set from the SEA and one set created by the LEA Administrator. Both sets are available to school as well as LEA plans. Tags designate special programs or populations that are associated with the action step (e.g. English Learners or LEA Gates grant activities.) Putting tags on action steps allows you to filter the plan for specific designations in the plan overview. For example, you may want to filter on all activities related to a specific grant to create a report for the funder.



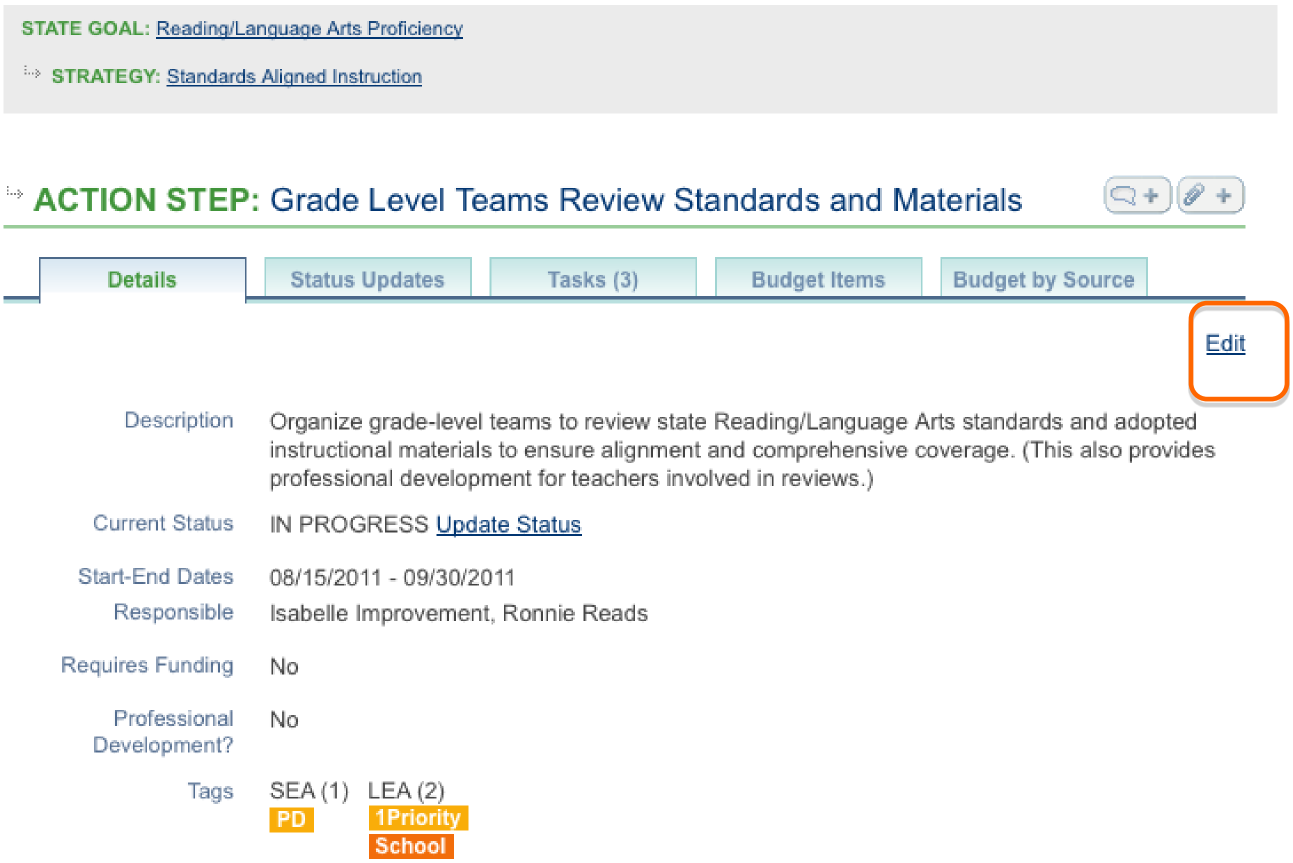
The LEA may have its own list of tags, specific to programs, priorities or designations for filtering and monitoring the plan. The LEA tags are created by the LEA Administrator. (See page 4.)

Finally, you may check one or more persons who are responsible for implementing this action step. A list of everyone associated with your plan (Administrators and Users) will appear for you to check off the appropriate names. When finished, click “Save” or “Save and Add Another” to continue plan entry. Below is an explanation of each field on the action step detail screen.

Title	Short title of the action step. **Maximum characters: 50**
Description	Detailed description of the action step. **Maximum characters: 1000**
Start Date / End Date	These dates will be graphed on the timeline and will trigger reminder icons on the plan overview to show which Items need attention. Choose from pop-up calendar or enter as **mm/dd/yyyy**
Timeline Notes	(Optional) Notes that will appear in the timeline regarding this action step. **Maximum characters: 255**
Requires Funding?	Check this box if the action step will require funding. This will enable you to later add budget Items from the action step overview screen.
Professional Development Needed?	Check this box if this action step involves professional development for staff.
Audience	Use this field to enter who would need to attend any professional development activities, if appropriate.
Tags	Check the appropriate tags that apply to the action step. These tags are used for filtering purposes on the plan overview and when generating reports. Check all that apply.
Responsible	Designate one or more person responsible for the implementation of this action step.

Action Step Overview

Once an action step is created, the action step overview is displayed. You also reach this view by clicking on the action step title from the plan overview. This screen allows you to access and add implementation information to the action step, such as status updates, tasks and budget items.



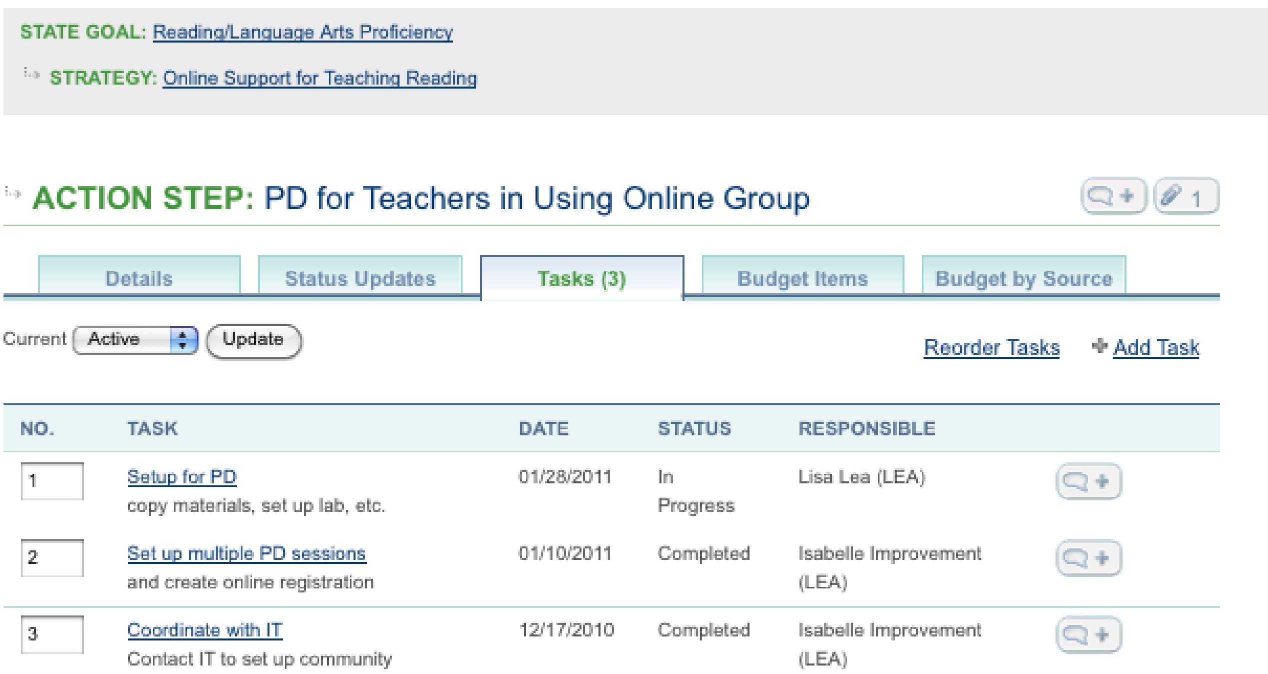
This is where the plan implementers will come to update their progress toward completing the improvement plan – attaching relevant files, adding comments and status updates, marking tasks as completed, and recording actual budget amounts spent. The default tab shows details of the action step content: Description, Start and End dates, Person Responsible, assigned Tags, etc. The edit button shows the action step entry screen and allows you to change any information.

Status Updates

Status updates and notes are intended not only to report on progress toward completion of the plan, but also to provide a thoughtful review of the effect of actions taken, and any adjustments recommended to accomplish the goal. Describing in detail what has been done, what the effects have been, and what will be done next will strengthen your plan. Status notes may be up to 255 characters in length. To add lengthier comments, use the comment box or add an attachment, and note in the status update where to look for additional information.

Tasks

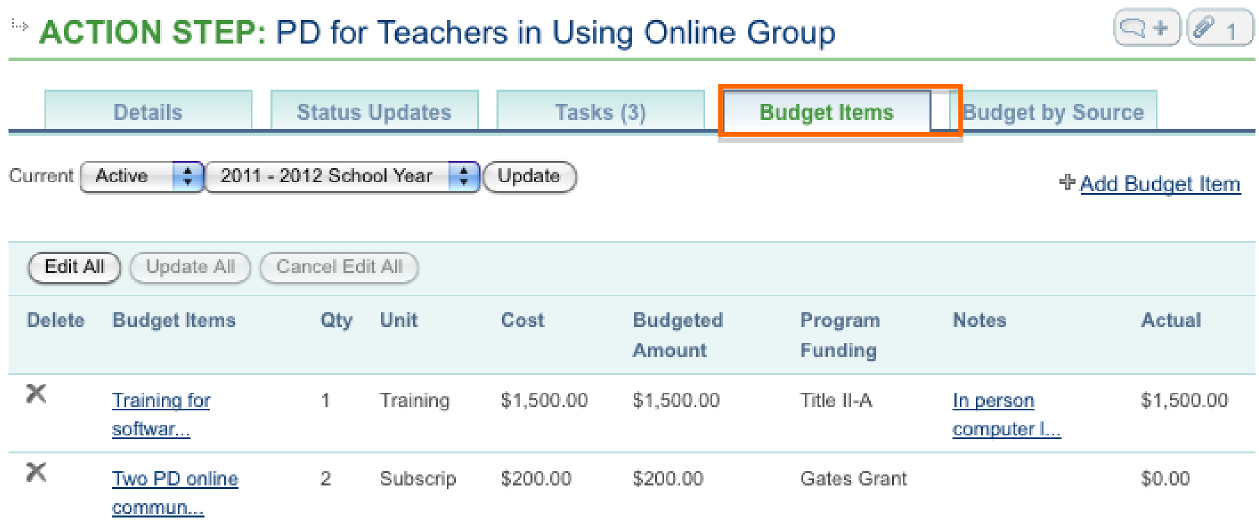
Once an action step is created, you may want to break it up into more granular, specific activities. Although tasks are optional, you may find them helpful to keep track of who is responsible for each part of the action step implementation. Tasks appear in the plan overview with their due dates to help keep you on target for implementing your plan. Task descriptions may be up to 255 characters.



Action Step Budget Items

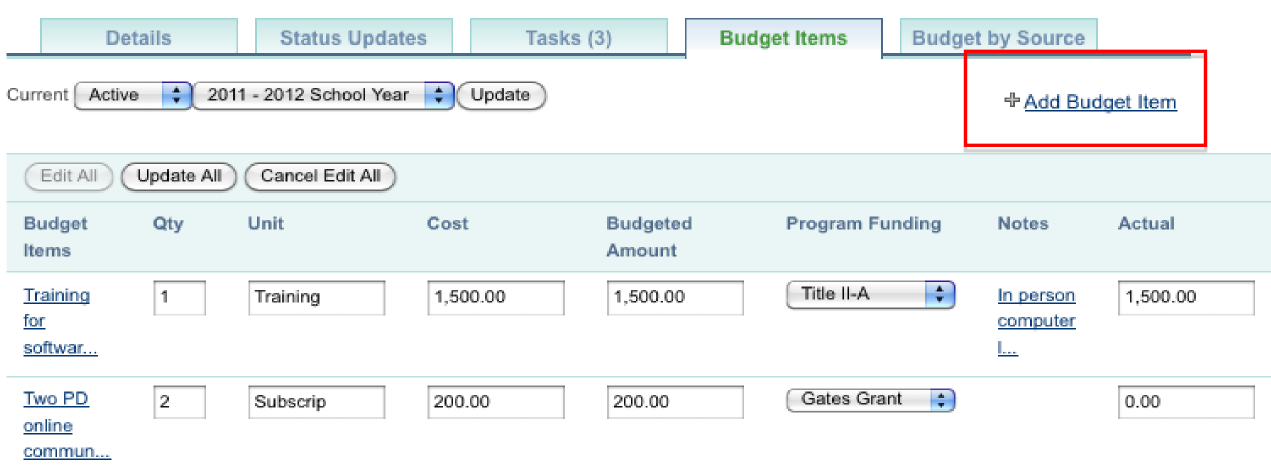
NOTE: Before you can add budget items to action steps, your plan administrator must add funding sources and allocations to the overall plan budget. (See page 8.) The plan budget section provides an area where you can review all available funds that you will use to complete your plan.

If your action step is checked as Requires Funding, you can use budget items to itemize costs, and indicate from which funding source the money will be applied. The budget items tab on the action step displays all amounts and funding sources already assigned to an action step.



Tracker filters budget items by school year. The school year for a budget item is determined by its funding source. You may use the school year filter to view records from previous years.

To edit all budget items for an action step simultaneously, click on “Edit All”. The table will allow you to change the Quantity, Unit, Cost, Budgeted Amount, Source, or Actual amount of any or all items. Click “Update All” to save your changes. You may edit a single budget item and notes by clicking on the title in the first column.



To add a budget line item, click “Add Budget Item”.

The budget item entry page displays a budget by source table of funds already allocated to this action step to help you determine where to pull the funding for your new budget Item.

The budgeted amount may be derived in one of two ways. Either enter the quantity and unit cost (Budgeted Cost will be calculated) or just enter a budgeted cost (no Quantity or per unit Cost information.) The budgeted and actual amounts will appear on your action step overview, and the total amounts allocated for all action steps will roll up to the strategy and goal levels of your plan. Click “Submit” to return to the action step page, or “Save and Add Another” to enter additional expenses for this step.

You are not required to assign a funding stream to budget items at this point. This is particularly helpful as you are developing your budget for the new year. Unfunded items are easily identified at any time from the plan budget page, described below.

Enter the information and save the record to add it to the action step.

Budget by Source

Funding Source	Budgeted ($)	Actual($)	Balance($)
Gates Literacy Grant	$200.00	$0.00	$200.00
Title II-A	$1,500.00	$1,500.00	$0.00
TOTAL FUNDS:	**$1,700.00**	**$1,500.00**	**$200.00**

Add Budget Line Item

2011 - 2012 School Year | Update

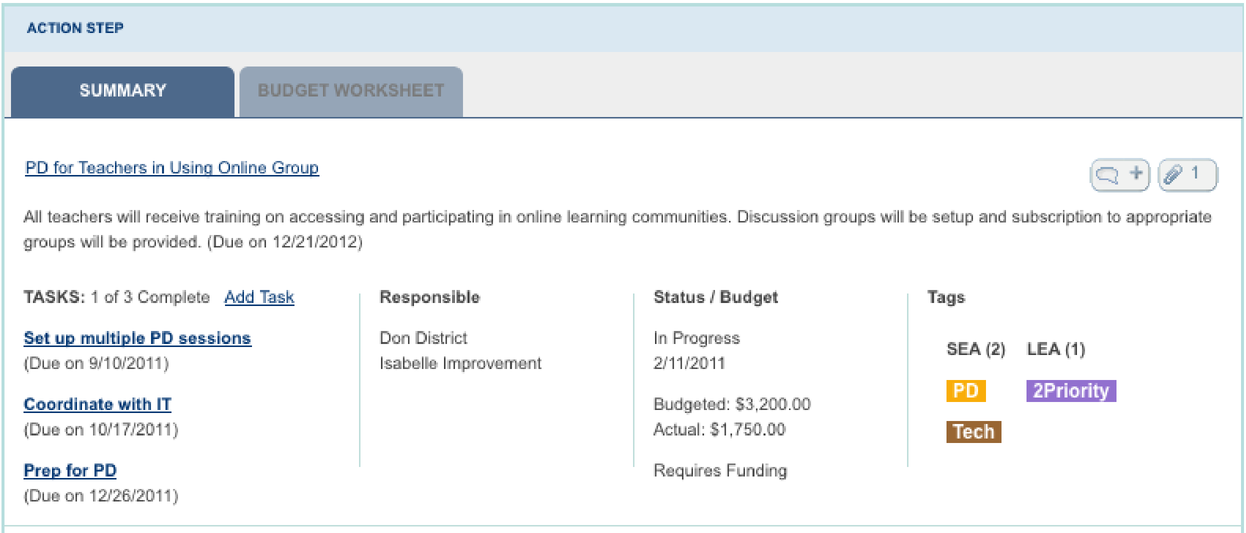
Funding Source (11-12)

Unfunded

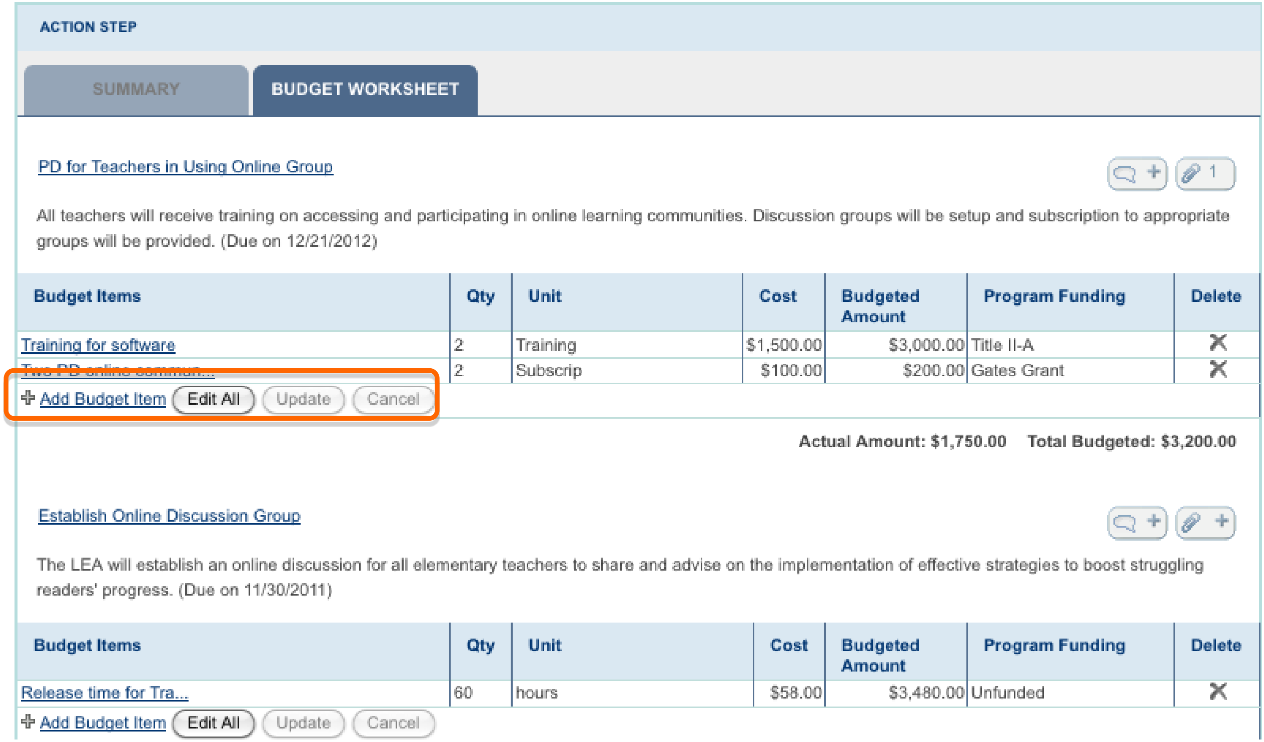
Title:*	
Quantity	
Unit	
Unit Cost	
Budgeted Cost	
Actual Cost	
Notes	

Budget Worksheet

Tracker also offers another way to add budget items to action steps. On the expanded plan overview, you will see two tabs at the top of an action step list under each strategy. Thes view contains the action step detail: Title, Description, Person Responsible, Status/Budget, Tags and Tasks. To edit any of this information, click on the title of the action step.



Next to the summary tab is a budget worksheet tab. When selected, it will show existing budget information for any action steps marked as Requires Funding. This view allows editing of all budget items, as well as adding or deleting Items.


ACTION STEP

SUMMARY | BUDGET WORKSHEET

PD for Teachers in Using Online Group

All teachers will receive training on accessing and participating in online learning communities. Discussion groups will be setup and subscription to appropriate groups will be provided. (Due on 12/21/2012)

Budget Items	Qty	Unit	Cost	Budgeted Amount	Program Funding	Delete
Training for software	2	Training	$1,500.00	$3,000.00	Title II-A	✕
Two PD online commun...	2	Subscrip	$100.00	$200.00	Gates Grant	✕

Add Budget Item | Edit All | Update | Cancel

Actual Amount: $1,750.00 Total Budgeted: $3,200.00

Establish Online Discussion Group

The LEA will establish an online discussion for all elementary teachers to share and advise on the implementation of effective strategies to boost struggling readers' progress. (Due on 11/30/2011)

Budget Items	Qty	Unit	Cost	Budgeted Amount	Program Funding	Delete
Release time for Tra...	60	hours	$58.00	$3,480.00	Unfunded	✕

Add Budget Item | Edit All | Update | Cancel

Note that if an action step Does Not Require Funding it will not appear in the budget worksheet. To add budget items to an action step, you must first check the “Requires Funding” box on the action step add/edit page.

Edit all for budget items opens all displayed fields of each item.

You may edit the Title, Quantity, Unit, Cost, Budgeted and Actual amounts, or Program funding the items. Once you’ve finished, click “Update” to save your changes, or “Cancel” to return to the original item information. Changing budget item information in the budget worksheet automatically updates this information wherever budget items/totals appear.

SUMMARY | BUDGET WORKSHEET

PD for Teachers in Using Online Group

All teachers will receive training on accessing and participating in online learning communities. Discussion groups will be setup and subscription to appropriate groups will be provided. (Due on 12/21/2012)

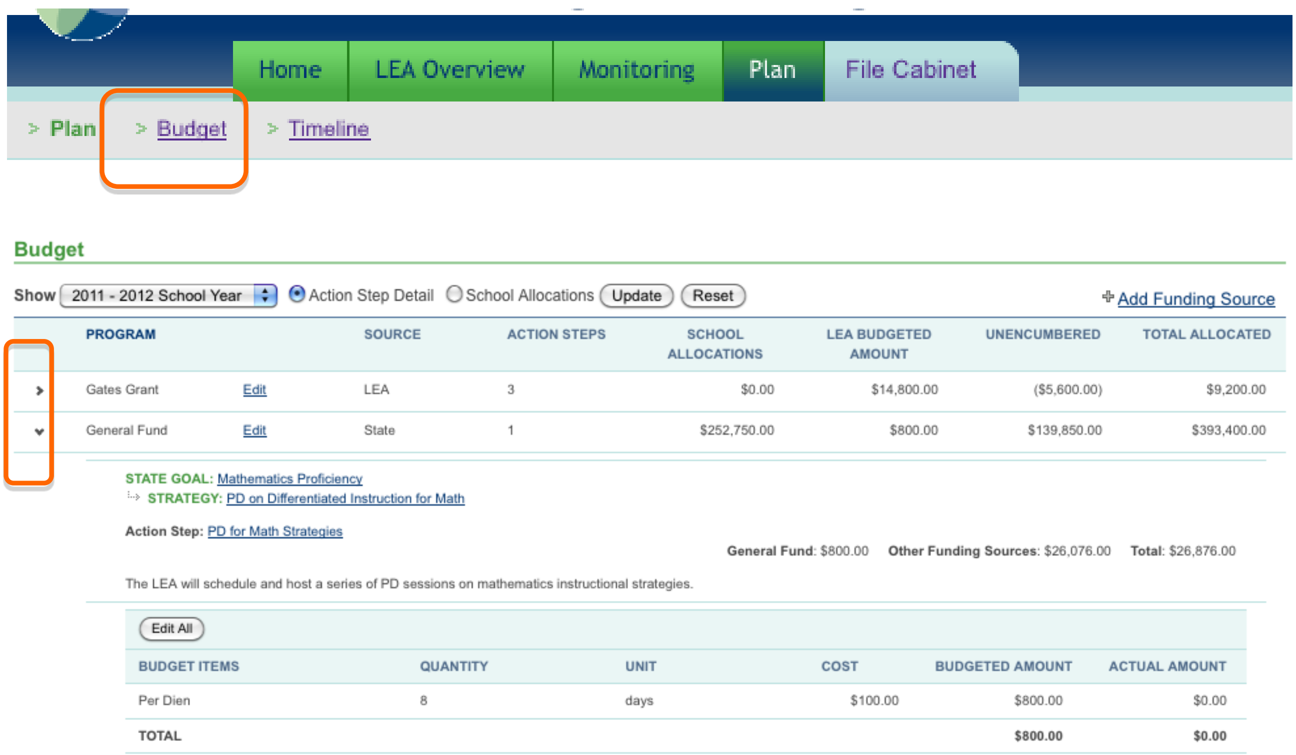
Budget Items	Qty	Unit	Cost	Budgeted Amount	Program Funding	Actual	Delete
Training for software	2	Training	$1,500.00	$3,000.00	Title II-A	$1,500.00	
Two PD online communities	2	Subscrip	$100.00	$200.00	Gates Grant	$250.00	

Add Budget Item | Edit All | Update | Cancel

Actual Amount: $1,750.00 **Total Budgeted: $3,200.00**

Plan Budget Page

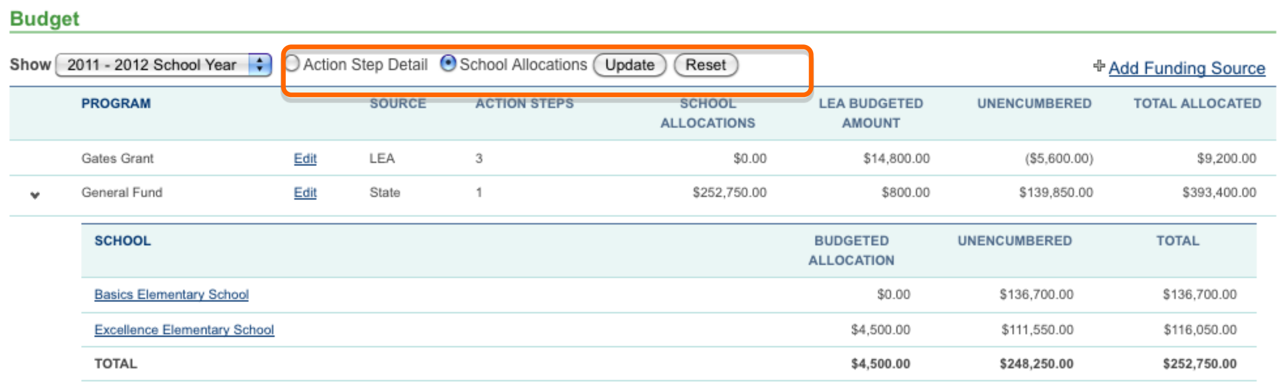
The Plan Budget page is a funding summary for your entire plan. To view this page, click the "Budget" link at the top of any page of your plan. You will see a list of all funding streams in the selected year, their source (Federal, State, LEA), number of action steps currently funded by this source, school allocations (on the LEA Budget), the budgeted allocation (assigned to Budget Items), unencumbered amount, and total allocation. Hover over the column headers to see tooltips or full descriptions of the column. All budget amounts are updated immediately when you make changes anywhere in the plan.



To view detailed expenditures for a particular funding source, click the arrow next to the program title to roll-out related action steps and budget items. You can also see if multiple funding sources are assigned to a specific action step. Please note that an action step may appear on the plan budget page more than once if it contains budget items from multiple funding sources.

School Allocations

On the LEA budget, you have the option to view the school allocation amounts for each source, where assigned, as well as their budgeted allocation and unencumbered totals for that funding source. Select the school allocations view at the top of the budget page and click "Update". Roll out any funding source that shows and amount in the school allocations column.



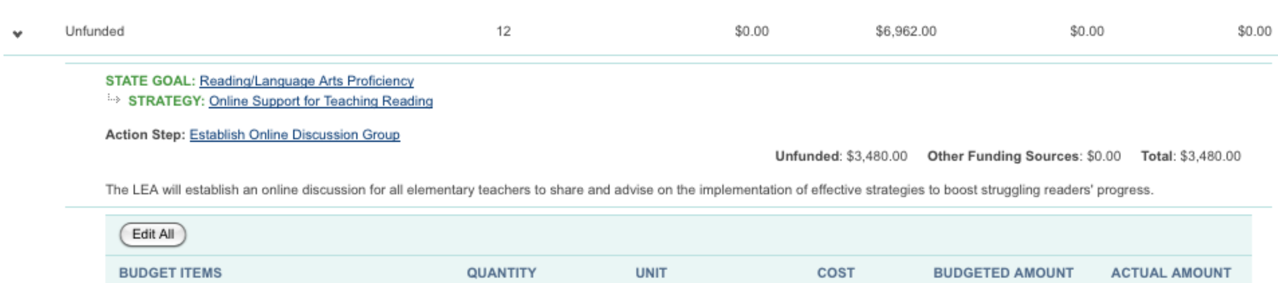
Click on the name of the school to go directly to their plan budget page and see how they have allocated the funds.

Unfunded Items

The final program line on the plan budget shows the unfunded Items in your plan. This allows you to easily identify and resolve action steps and budget items that require funding. Action steps appear as unfunded under two circumstances:

The Action Step is checked as Requires Funding, but contains no Budget Items
The Action Step contains Budget Items that are not yet assigned a program funding source.

To add items or assign funding sources, click on the action step title to go to the budget items tab. Once you have determined how you will fund these items and add funding sources, they will move to the appropriate program source in your budget.

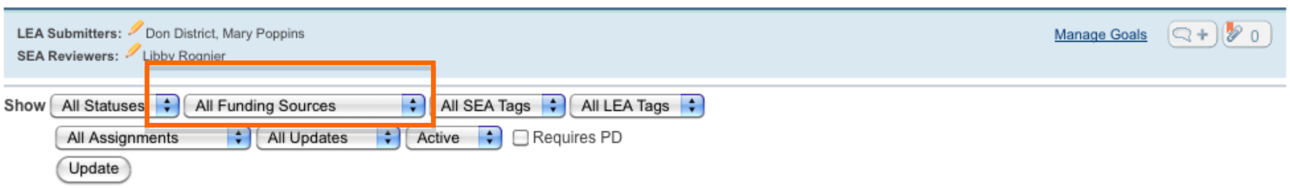


Updating and Monitoring the Plan

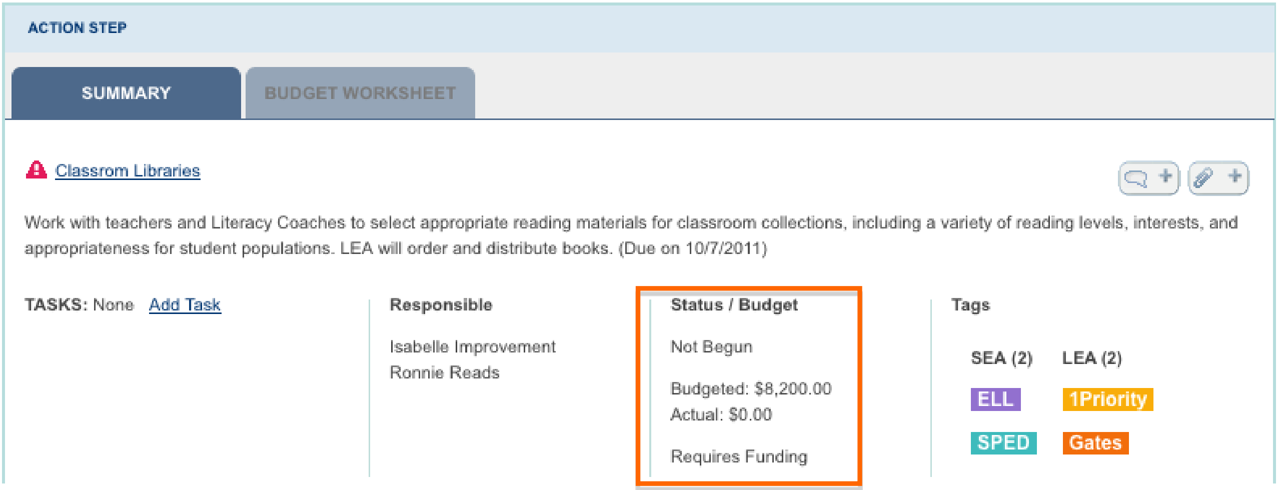
Plan Budget Tracking

You may access and edit budget items from the plan budget, from the plan overview budget worksheet tabs on action steps, or from the individual action step budget Items tab. Actual amounts spent for the Items may also be entered in any of these places.

To track the expenditures from a specific program funding source, either roll-out that source on the budget page, or select the funding source from the filters at the top of the plan.



When a funding source filter is applied, you will see only those action steps, with associated strategies and goals, which have budget Items assigned to that source.



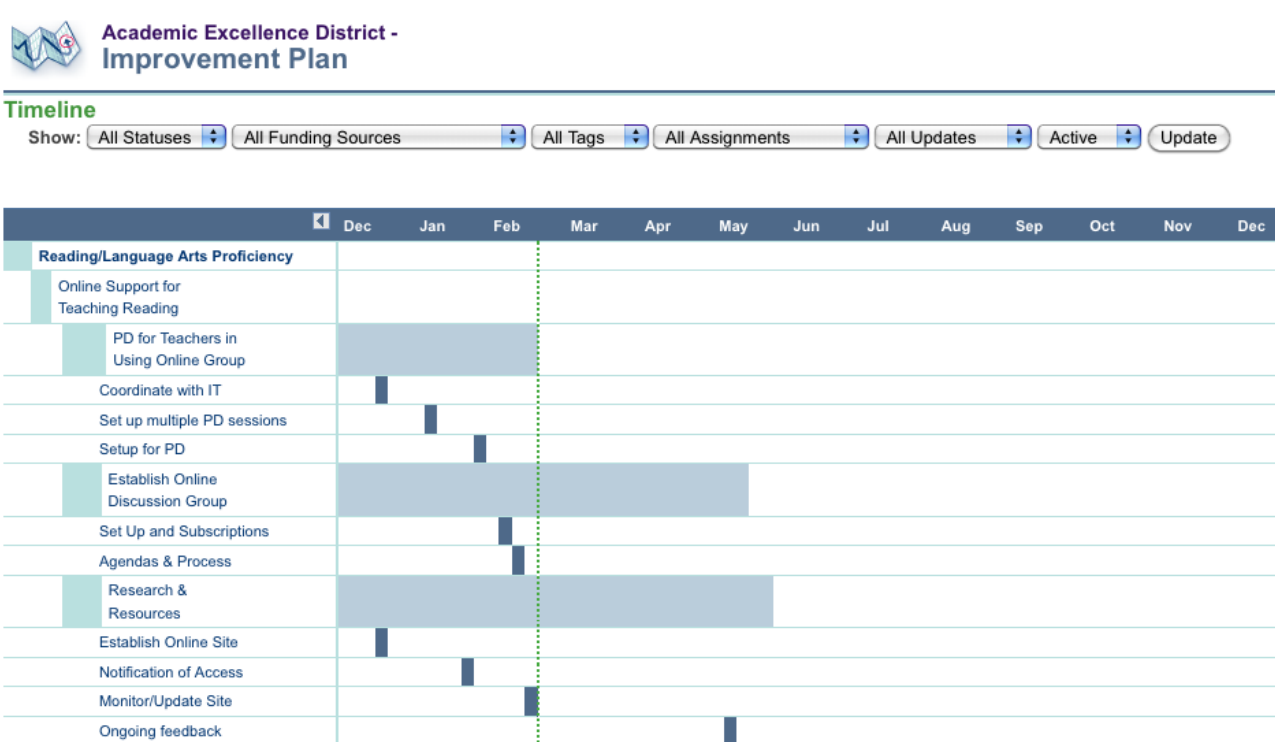
The budgeted and actual amounts show in the action step lines of the plan overview. You may view the plan activities in the context of one specific funding source, and print that view, to provide detailed plan information to program or grant monitors.

Plan Modifications

After you finish entering your plan, you may go back at any time to make edits to a goal, strategy, action step or task through the plan overview page. You will also want to regularly update the status of action steps and tasks, provide actual budget amounts, and attach relevant files to provide evidence of implementation and effectiveness.

Timeline

Once your plan is entered in Tracker, the timeline view lets you see the distribution of activities and provides a visual chart of what should be in progress or due throughout the year. The light



blue boxes show the span of each action step. Dark blue lines designate task due dates. The dotted green line is the current date. By looking across the school year, implementers can see upcoming due dates, and make sure the distribution of activities is reasonable. The titles of the action steps and tasks are linked to those content pages in Tracker, allowing quick adjustment of due dates, if necessary.

The timeline may also be filtered by any of the available plan overview filters. Users can view just the activities they are responsible for, or view by tags or funding sources.

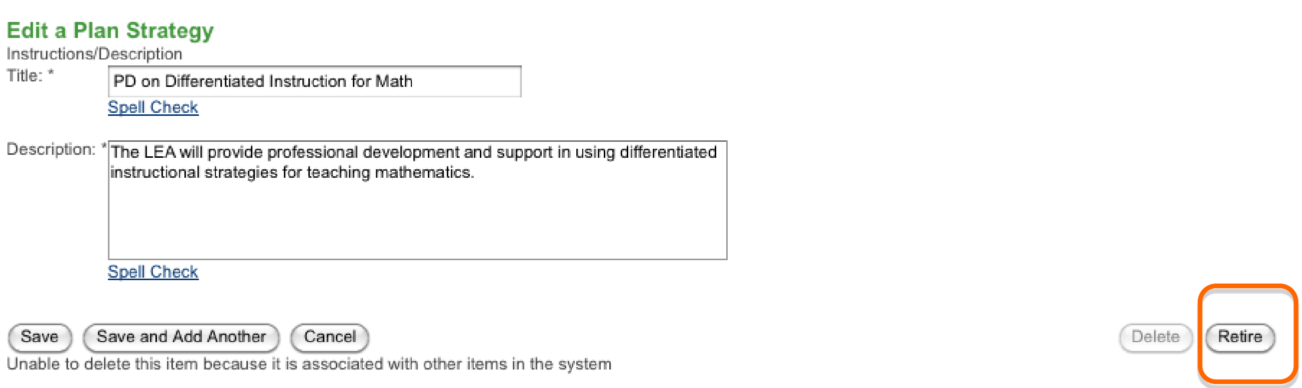
Implementation Checklist

The status note histories of all action steps are shown in the implementation checklist report. This can be a useful report for the implementation team to keep track of progress, or to show to stakeholders who want to see what steps the school has taken toward improvement. You may produce a full or filtered version of this report from the plan overview page.

Retiring Plan Elements

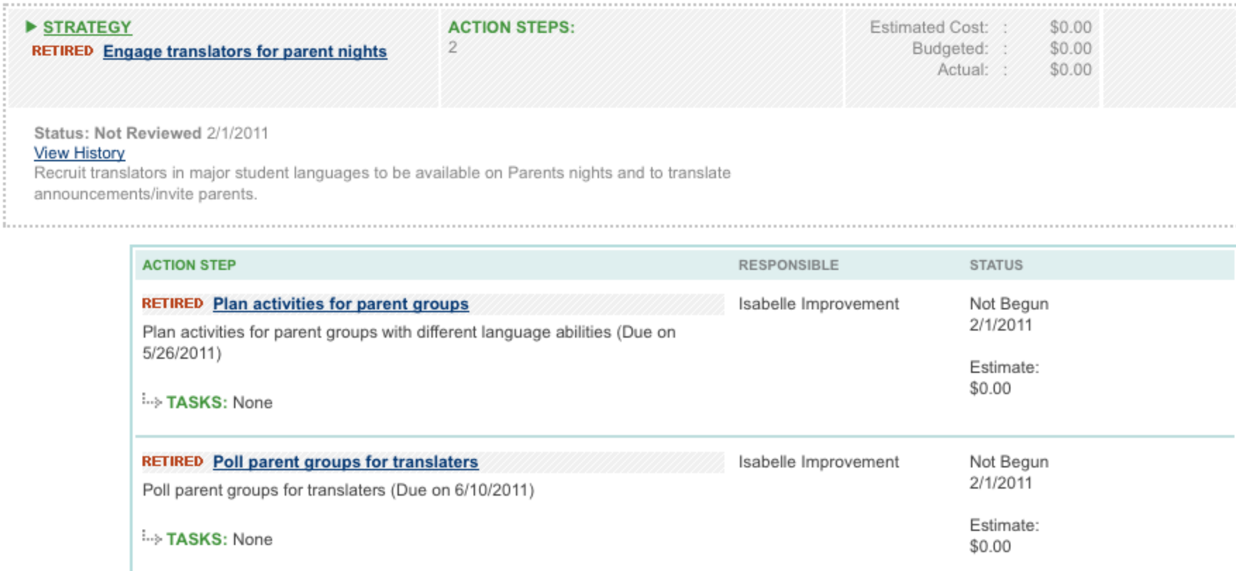
Your Tracker Plan is a continuous action plan. Some goals, strategies and action steps may be carried over year to year, some may be completed or no longer valid. Once a plan element is no longer a current reflection of your year's work, you may wish to "Retire" it from view in your ongoing plan. Any element added by the LEA or school may be retired. (State auto-assigned goals may only be retired by the SEA. SEA-retired goals may be re-set to active by the LEA, if you'd like to keep it in your plan.) Retiring any element automatically retires everything below it in the plan: retiring a goal also retires all associated strategies, action steps and tasks. Retiring an action step also retires its tasks, but leaves the associated strategy and goal unchanged. Once an element is retired, it may be viewed by selecting the "Show Retired" filter at the top of the plan. Any retired element may also be re-activated and brought back into the current plan, along with all of the retired elements below it.

To retire a plan element, click on the title to go to the edit page. You will see the "Retire" button to the far right of the "Save" and "Cancel" buttons.

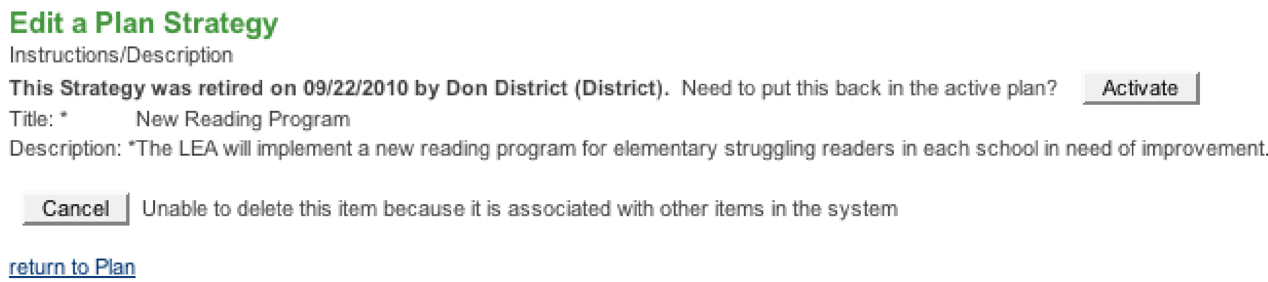


After you confirm that you want to retire the element, it will be removed from the active plan view.

To Re-Activate retired elements, select "Retired" from the Active/Retired filter list at the top of the plan and click update. You will see all retired elements.



Select the title of the element you wish to re-activate to go to the edit page. You will see a history of who retired the item and the date it was retired. Click on the “Activate” button to place the element back into your current, active plan. Any associated elements that were retired with this item will also be activated. You may retire them individually, if you don’t want them in your active plan.



Once you return to your plan, change the filter back to Active to see that the element has been restored to active status. The active view of the plan is the default view, which you will see each time you login to your plan.